

WITS Implementation Toolkit

For All Substance Use Disorder Network Service Providers



February 20, 2013

Overview

Beginning July 1, 2013, all SUD network providers will be required to utilize WITS as their billing record to track and submit claims for payment. This WITS Implementation Toolkit is intended to provide you with tools to assist in the transition from your current system to WITS for tracking client demographics, services, and billing.

WITS is the acronym for Web Infrastructure for Treatment Services. WITS is the web based application that has been chosen to be the Idaho statewide data collection and management system, as well as the Electronic Health Record (EHR) system for state funded substance use disorder treatment in Idaho. WITS was developed by FEI under a SAMHSA project which started in 2001. WITS is currently used in many states and counties for Substance Use, Mental Health and Criminal Justice agencies. WITS is fully compliant with HIPAA and CFR 42, Part 2.

The WITS Implementation Toolkit gives providers some guidance on the following areas:

- Assessing Agency Readiness
- Assessing Staff Readiness
- Scheduling Training
- Preparing for July 1, 2013
- Monitoring WITS Utilization after July 1, 2013

The WITS Implementation Toolkit is not a requirement and you will not be asked to turn in any of the noted tables. The Toolkit is provided simply as a useful tool. Note that the Toolkit may not contain all the items your agency will need for successful implementation. The [SUD Provider WITS eManual](#) will be very useful in helping you understand how the system works and how your agency will best utilize your staff and resources. It can be found by clicking the above link.

Timelines for expected completion of each targeted area are noted. Trainings will be offered twice per month that will address targeted areas to assist you in preparing for implementation. To register, go to www.WITS.dhw.idaho.gov.

If you have questions, please contact the IDHW WITS Help Desk at 208-332-7316, or dbhwitshd@dhw.idaho.gov. Additional information on Health Information Technology (HIT) can be found at: <http://www.hrsa.gov/healthit/toolbox/HealthITAdoptiontoolbox/>

TIP for successful implementation:

In order to improve efficiency of staff, it is critical to encourage a move away from documenting on paper forms and transferring the information into WITS later.

1) Assessing Agency Readiness (March)

- Evaluate Management Buy-in
Management buy-in and participation is an essential element of a successful implementation. Ensure that management and supervisors have an understanding of their role in the successful implementation of WITS.

- Determine how you will plan for your implementation

A committee designated to make decisions about the use of WITS in your agency is a worthwhile investment of staff time. Note which of the following are planned for your office or facility.

Have Done	Plan To Do	No Plans	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Establish a multidisciplinary team to do project planning
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Map out key workflows such as intake, medical records
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Identify program inefficiencies, problems
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Discussions at staff meetings to ensure staff awareness
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Identification of who will lead EHR implementation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Determine the best person to monitor and set policies for the organization around the use of the system

- Complete a workflow analysis and possible redesign
 - The first task is the determination of how you will use WITS and who will enter data into WITS modules. This determination should be made prior to completing the workflow analysis.
 - Consider who will enter data such as client profiles, intake and program enrollments (e.g., will you use all clerical staff or will clinical staff enter this data).
 - Note that GAIN will continue to be entered by GAIN certified staff.
 - Determine staff who will be responsible for:
 - connection issues
 - resetting user passwords
 - setting up new staff with WITS User Accounts
 - submitting security access forms
 - accepting referrals and authorizations
 - billing
 - generating billing reports

To assist you with these decisions, you can attend the monthly WITS Q & A sessions (see the WITS Training Calendar).

- The second task is to consider how the use of WITS will change your current work procedures. Analyze existing paper workflows for Client Referral, Client Check-in, Intake, and Discharge. It is critical that you consider your current workflows and determine if your program will need to make changes in the process in order to

facilitate the use of WITS. The most effective way to do this is through process mapping or workflow diagram.

Below is a mini workflow diagram of a typical intake process as an example (your program's process will likely differ from this example).



Additional samples of workflow diagrams to assist you in developing effective workflow analyses can be found on the Department of Health and Welfare website, under [WITS Decision Trees for SUD Providers](#).

Helpful instructions for Workflow redesign can be found on page 8.

- Assess availability of equipment, such as computers and printers, for those needing to enter data. Determination of who will enter data should be made prior to completing the equipment analysis. Based on your workflows assess your equipment needs. You may need more computers and possibly printers, or you may need to relocate computers and printers so that they will be accessible by staff that will be entering data into WITS.

See the example below. You will find a blank table you can use for this assessment on page 9. Fill in the information about equipment that is pertinent to your program.

STAFF POSITION AND NAME	HAS A/OR HAS ACCESS TO A COMPUTER AND/OR PRINTER	DOES NOT HAVE A /OR HAVE ACCESS TO A COMPUTER AND/OR PRINTER	NEEDS ACCESS TO A COMPUTER	NEEDS ACCESS TO A PRINTER	NEEDS OTHER EQUIPMENT	IF NEW EQUIPMENT NEEDED, WHAT TYPES	DOES NOT NEED ANY ADDITIONAL EQUIPMENT
CLINICAL STAFF							
OFFICE STAFF							
OFFICE MANAGER							
OTHER STAFF							

- Assess wireless or other internet connections

The following are basic requirements for operating WITS:

- Windows 2000 or later.

- Internet Explorer 6.0 or higher (*IE version 10 works only in compatibility mode when it is running in conjunction with Windows 8. IE 10 stand alone will not work.*)
 - Screen Resolution: 1024 x 768 or higher.
 - Adobe Reader installed.
 - Silverlight browser plug-in (*WITS will prompt you to download the plug-in the first time the Scheduler or the GAIN SS is accessed. Contact your technical support if Silverlight does not download.*)
 - Pop-up Blocker must allow access to the WITS and GAIN ABS secure websites.
 - Trusted sites must allow access to the WITS and GAIN ABS secure websites.
- **NOTE: WITS will not work with: Google Chrome or Firefox.**
- Evaluate the obstacles to implementation at your agency. See the example below. You will find a blank table you can use for this assessment on page 10. Fill in the obstacles that are pertinent to your program.

POSSIBLE OBSTACLES	VERY LIKELY	SOMEWHAT LIKELY	NEITHER LIKELY OR UNLIKELY	SOMEWHAT UNLIKELY	VERY UNLIKELY
CLINICAL STAFF RESISTANCE					
ADMINISTRATIVE STAFF RESISTANCE					
INSUFFICIENT TIME FOR TRAINING					
LACK OF COMPUTER EQUIPMENT					

2) Assessing Staff Readiness (April)

- For each of your staff, assess if they are very supportive, somewhat supportive, ambivalent, somewhat unsupportive, or very unsupportive. Include Program Managers in the assessment. See the example below. You will find a table you can use for this assessment on page 11.

STAFF POSITION AND NAME	VERY SUPPORTIVE	SOMEWHAT SUPPORTIVE	AMBIVALENT	SOMEWHAT UNSUPPORTIVE	VERY UNSUPPORTIVE
CLINICAL STAFF					
OFFICE STAFF					
OFFICE MANAGER					
OTHER STAFF					

- Consider basic PC/internet training for anyone who is computer phobic or needs additional help. Remember that WITS is accessible through a basic internet connection, and is fairly self-guided as long as staff are comfortable navigating a computer. Consider how comfortable each staff will be using a computer or if they will need additional training or support. See the example below. You will find a table you can use for this assessment on page 12.

STAFF POSITION AND NAME	EXTREMELY COMPETENT	VERY COMPETENT	SOMEWHAT COMPETENT	LITTLE COMPUTER EXPERIENCE	VERY LITTLE OR NO COMPUTER EXPERIENCE
CLINICAL STAFF					
OFFICE STAFF					
OFFICE MANAGER					
OTHER STAFF					

- Designate two (2) staff members as WITS Agency Administrators. Agency Administrators provide basic technical support to the agency and manage staff security access.
 - It is suggested that agencies select staff with a propensity toward technology that can be easily contacted by other staff throughout the work day.
- Consider who will attend the Idaho WITS User Group (IWUG) meetings.
- Develop a plan for current client data to be entered into the system (after training).

3. Training

- A comprehensive training plan is crucial to a successful implementation. Based on the workflows for your agency, determine who will need to attend training and decide on a date for the training session for that staff. Set aside the time for the staff to go to training and also for when they return so that they have some practice time to get comfortable using what they learned in the training. Make sure they will have access to the equipment they need when they return from training.

Types of training that will be offered are:

a) Agency Administrator Training

Topics include: How to provide basic technical support to the agency, Manage staff security access.

b) Basic Agency Module Training

1. Core Module

- Client Profile, Intake, Program Enrollment for non-treatment and treatment programs, Viewing and Linking Client Records, Accepting Referrals and Authorizations, Admission.

2. Billing Module

- Topics include: Notes (Group, Encounter, Miscellaneous), Billing Reports, Consenting Client Records.

3. Discharge Module

- Topics include: Program Disenrollment, Discharge, Closing the Intake.

Check the WITS Training Calendar and note dates by training participant. See the example below. You will find a table you can use for this information on page 13.

STAFF POSITION AND NAME	AGENCY ADMINISTRATOR TRAINING	CORE TRAINING	BILLING TRAINING	DISCHARGE TRAINING
CLINICAL STAFF				
OFFICE STAFF				
OFFICE MANAGER				
OTHER STAFF				

- Use the **Preparing for WITS Implementation** document for guidance on registering for training.

4. Prepare for July 1, 2013 (May, June)

- Set policies for data entry of current clients in WITS. Set policies and procedures for accepting referrals and authorizations for certain clients in WITS. Include a plan for how to handle hybrid records (records that may be partially hard copy and partially electronic).
- Identify active clients prior to initial training to allow the WITS Help Desk staff to assist with closing records.
- Set data entry dates and enter client data in WITS.
- Staff who attended training will begin entering data in accordance with dates set by agency.
- Agency representative who attended training in June should conduct an agency-wide training for appropriate staff.
- Policies regarding use of WITS, ongoing entry, and reporting should be in-place and information should be communicated to all staff.

5. After July 1, 2013

- Monitoring the effectiveness of your implementation.

Programs should plan ahead to have monitoring in place once they implement WITS. Examples of what should be monitored include:

- Staff have completed all training
- Staff who have completed training are using WITS
- Staff who have not been trained are not using WITS
- All state funded clients are being entered into WITS

A tool with suggested items include in the Toolkit. See page 14.

- Ensure that you have a monitoring system in-place to check that all staff are using their own WITS staff user accounts (user ID, password, and pin) and no account sharing amongst staff is occurring.

Workflow Tips

For each work flow

- Identify every staff member who is part of the process
- Have each staff member note every specific action they perform for that process
- Avoid having someone other than the person who does the work fill out steps in process as details may be overlooked or forgotten
- Have each action recorded on a post-it note
- Write only one action per post-it note
- Arrange the post-it notes in order
- You now have an accurate template for your workflow

Identify changes that will occur due to implementing WITS

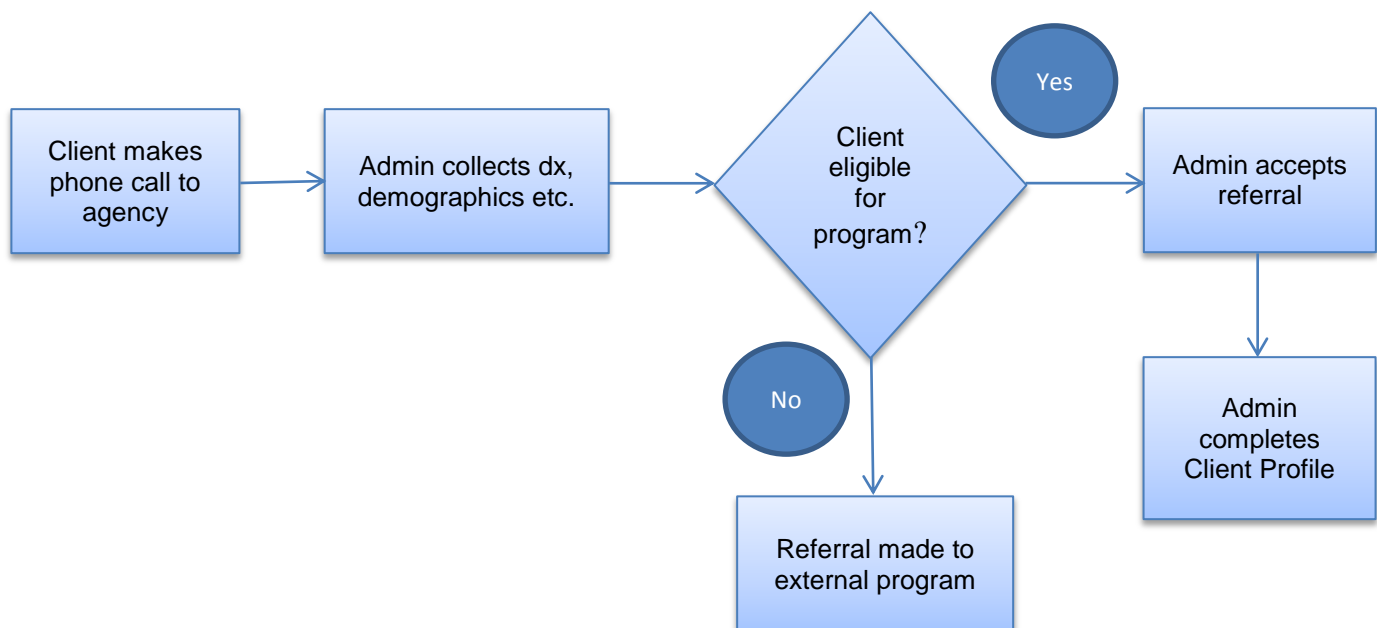
- What steps will not change?
- What steps will not occur in the future?
- What new steps need to be added?

While you are assessing your workflow you may also consider the following:

- Are there any steps that are redundant and could be taken out of the process?

Workflow tools can be found under Shapes in Word or in Visio.

Sample Workflow for client referral:



Equipment Needs

STAFF POSITION AND NAME	HAS A/OR HAS ACCESS TO A COMPUTER AND/OR PRINTER	DOES NOT HAVE A /OR HAVE ACCESS TO A COMPUTER AND/OR PRINTER	NEEDS ACCESS TO A COMPUTER	NEEDS ACCESS TO A PRINTER	NEEDS OTHER EQUIPMENT	IF NEW EQUIPMENT NEEDED, WHAT TYPES	DOES NOT NEED ANY ADDITIONAL EQUIPMENT
CLINICAL STAFF							
OFFICE STAFF							
OFFICE MANAGER							
MANAGEMENT							
OTHER STAFF							

Obstacles to Implementation

ISSUES THAT COULD BE AN OBSTACLE	VERY LIKELY	SOMEWHAT LIKELY	NEITHER LIKELY OR UNLIKELY	SOMEWHAT UNLIKELY	VERY UNLIKELY
CLINICAL STAFF RESISTANCE					
ADMINISTRATIVE STAFF RESISTANCE					
INSUFFICIENT TIME FOR TRAINING					
LACK OF COMPUTER EQUIPMENT					

Staff Readiness Assessment Tool #1

[illegible]

Staff Readiness Assessment Tool #2

STAFF POSITION AND NAME	EXTREMELY COMPETENT	VERY COMPETENT	SOMEWHAT COMPETENT	LITTLE COMPUTER EXPERIENCE	VERY LITTLE OR NO COMPUTER EXPERIENCE
CLINICAL STAFF					
OFFICE STAFF					
OFFICE MANAGER					
MANAGER					
OTHER STAFF					

Staff Training Plan

STAFF POSITION AND NAME	AGENCY ADMINISTRATOR TRAINING	CORE TRAINING	BILLING TRAINING	DISCHARGE TRAINING	STATEWIDE TRAINING
CLINICAL STAFF					
OFFICE STAFF					
OFFICE MANAGER					
OTHER STAFF					

After July 1, 2013 Monitoring

Item	Strongly agree	Agree	Unsure	Disagree	Strongly disagree	NA	Comments
All staff have been trained							
All trained staff are using WITS							
Any staff who have not been trained are not using WITS							
All clients are being entered into WITS							
All computers and printers are working							
Staff has access to the equipment they need							
Staff are coping well with the change to using WITS							
Clients are reacting positively to the use of WITS							
Billing is occurring in WITS as expected							
Client information is accessible as needed							
Use of WITS has improved the efficiency of staff							